

## Thursday, August 4, 2016

The Probate Examiner's Office recommends approval of the following Probate matters:

22 16CEPR00672 Robert Emerzian (Det. Succ)

#### The following cases have been taken off calendar:

7 15CEPR00955 Ronnie G. Mekealian (Estate)
 11 16CEPR00069 Virginia Anderson (Estate)

Appearance of counsel is recommended for all remaining matters set for hearing. Thank you.

Jaech, Jeffrey A. (for Conservator Larry D. Edde)

Ninth Account and Report of Conservator and Petition for Settlement Thereof and for Allowance of Attorneys' Fees

		<b>LARRY D. EDDE</b> , Brother/Conservator with bond of \$375,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/1/14 - 12/31/15	Note: The Court will set a status hearing for the filing of the next account as follows:
\rightarrow \right	Aff.Sub.Wit.  Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail W Aff.Pub.	Accounting: \$1,503,740.36 Beginning POH: \$1,089,315.85 Ending POH: \$1,229,013.24 (\$1,215,648.21 cash plus various personal property items)  Conservator: Waives  Attorney: \$7,002.00 (for 37.7 attorney and paralegal hours in connection with accounting, general matters, and the conservatee's move, as itemized)	Thursday, June 7, 2018  • Thursday, June 7, 2018
	Sp.Ntc. Pers.Serv. Conf. Screen	Costs: \$435.00 (filing fee)  Bond: In lieu of increasing bond, Petitioner	
~	Letters Duties/Supp Objections	requests to transfer \$170,000.00 to a blocked account, which would allow the current bond to remain sufficient.	
<b>&gt;</b>	Video Receipt  CI Report  2620(c)  Order  Aff. Posting	<ul> <li>Petitioner prays for an Order:</li> <li>1. Approving, allowing and settling the ninth account;</li> <li>2. Confirming and approving all acts of Conservator;</li> <li>3. Authorizing the transfer of \$170,000.00 to a blocked account;</li> </ul>	Reviewed by: skc
	Status Rpt UCCJEA Citation FTB Notice	<ul> <li>4. Authorizing attorney fees and costs; and</li> <li>5. For such other relief as the Court considers proper.</li> </ul>	Reviewed on: 7/29/16 Updates: 8/2/16 Recommendation: File 1- Edde

### 2 Alexis Cedano, Victor Cedano, Gabriel Cedano, Noah Cedano, Jayden Cedano, Reyna Cedano, Victoria Cedano, Jonah Cedano (GUARD/P) Case No. 11CEPR00795

Petitioner: Jennifer Cedano (pro per) Objector: Raul Pallares, Jr. (pro per)

#### **Petition for Visitation**

			Petition for Visitation	
			<b>JENNIFER CEDANO</b> , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			RAUL PALLARES, JR. paternal cousin, was appointed as guardian of Noah	This petition is as to NOAH and GABRIEL only.
	ont. from 04071 1616	6,	and Gabriel on 11/16/11  Please see petition for details.	Continued from 6/16/16. Minute order states the Court Investigator is
<b>√</b>	Aff.Sub.Wit.			ordered to speak with the children regarding visiting with mother.
-	Inventory			
	<del> </del>			1. Notice of Hearing filed on 7/18/16
-	PTC No. d			is defective. It does not state that
	Not.Cred.	\ \		a Petition for Visitation was filed at #1.
	Notice of	Х		π1.
	Hrg Aff.Mail	Χ		2. Need Proof of service of the
		_ ^		Notice of Hearing (showing that a
-	Aff.Pub.			Petition for Visitation was filed) on:
-	Sp.Ntc.			a. Raul Pallares, JR. (guardian)
-	Pers.Serv.	<u> </u>		b. Noah Cedano (minor) c. Gabriel Cedano (minor)
	Conf. Screen			c. Gabriel Cedario (minor)
	Letters	<u> </u>		
	Duties/Supp			
	Objections	<u> </u> 		
	Video Receipt			
	CI Report			
	9202			
	9202 Order	Χ		
	Aff. Posting			Reviewed by: KT
1	Status Rpt	<u> </u>		Reviewed by: N1
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 2- Cedano
<u> </u>	I ID HOICE	<u> </u>		THE 2- COUNTY

Attorney Nancy J. LeVan (Court-appointed for Conservatee)

Petition for Attorney Fees and Order Terminating Appointment as Counsel For Conservatee

DC	D: 3/11/2015					
Co	nt. from					
Ë	Aff.Sub.Wit.					
F	Verified					
<u> </u>	Verilled					
	Inventory					
	PTC					
	Not.Cred.					
	Notice of	Χ				
	Hrg					
	Aff.Mail	Χ				
	Aff.Pub.					
	Sp.Ntc.					
	Pers.Serv.					
	Conf.					
	Screen					
	Letters					
	Duties/Supp					
	Objections					
	Video					
	Receipt					
	CI Report					
	9202					
<b>√</b>	Order					
	Aff. Posting					
	Status Rpt					
	UCCJEA					
	Citation					
	FTB Notice					

**NANCY J. LeVAN**, Attorney courtappointed on 5/14/2013 to represent the Conservatee, is Petitioner.

**PUBLIC GUARDIAN** was appointed Conservator of the Person and Estate on 6/19/2013.

#### **Petitioner requests:**

- Payment of fees from the Conservatorship Estate in connection with the representation of the Conservatee for the Public Guardian's petition to appoint a conservator from the period of 5/21/2013 through 7/5/2016;
  - That she be paid for 6.90 hours, including for appearance at Court on 7/5/2016 for the hearing on the Second Account, at \$200.00 per hour;
- That the filing fee of \$435.00 for this petition be reimbursed to Petitioner; and
- That the Public Guardian as Conservator be of the Estate be directed to pay for her services from the conservatorship estate;
  - ~Please see additional page~

#### **NEEDS/PROBLEMS/COMMENTS:**

1. Order Settling Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and Her Attorney, and Distribution filed 7/5/2016 authorizes final distribution. after payment of allowed commissions, fees, and costs, of the entirety of the Conservatorship Estate assets. The instant Petition for Attorney Fees and Order Terminating Appointment as Counsel for Conservatee was filed 6/27/2016. Local Rule 7.15.9(E) provides that if an attorney is appointed by the Court to represent a proposed conservatee in connection with appointment of a conservator, any request for attorney fees in relation to the appointment shall be made within 90 days of the appointment of a conservator. If the attorney fees requested related to any other matter involving the conservatee, such as sales or accountings, said fee request shall be made no later than 90 days after the hearing on or conclusion of the matter. If the Court does not discharge counsel for a conservatee at the hearing of a matter and continues the appointment, any final fee request of court-appointed counsel shall be made within 90 days after the Court later discharges counsel, but in no event later than the hearing on a final account.

~Please see additional page~

Reviewed by: LEG

Reviewed on: 8/1/16

Updates:

Recommendation:

File 3- Westenrider

#### 3 Additional Page, Lavon Westenrider (CONS/PE) Case No. 13CEPR00393

#### **Petitioner states:**

- On 6/14/2016, she received the Second and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and her Attorney; and Distribution, and upon reviewing the file she discovered she had never petitioned for attorney fees; on 6/26/2016, she prepared this petition for attorney fees;
- The value of her services connected with this matter is \$1,380.00 (6.9 hours at \$200.00/hour); since this petition is very late, she will reduce her rate by 15% pursuant to the rules of the Superior Court's instructions for Claims Processing Policy for Court Appointed Attorney effective 6/1/2013;
- Therefore, the value of her services minus 15% (calculated as \$207.00) is \$1,173.00;
- Petitioner requests she be paid a total of \$1,608.00.

Services are itemized by date and include review and draft of documents, visits with client, and court appearances.

#### NEEDS/PROBLEMS/COMMENTS, continued:

- 2. Court records do not show notice of the instant request for fees was served on the Public Guardian pursuant to Probate Code § 1470 et seq.
- 3. Itemization includes time entry dated 7/5/2016 at a charge of **\$200.00** for attendance at hearing. However, the *Minute Order* dated 7/5/2016 from the hearing on the Public Guardian's *Second and Final Account* does not show that Attorney LeVan appeared at the 7/5/2016 hearing.

#### 4 Gabriella Krystal Simental (GUARD/E)

Case No. 14CEPR00657

**Petitioner** 

Melinda C. Simental (Pro Per, mother, Guardian of the Estate)

First Account and Report of Melinda C. Simental of Gabrielle Krystal Simental and Estate

			Simental and Est	ate		
			MELINDA C. SIMENT	<b>(AL</b> , mother and		
			Guardian of the Estate, is Petitioner.			
			Account period: 3/10	<u> </u>		
Со	ont. from		Accounting			
	Aff.Sub.Wit.	- Not stated				
1	Verified		Beginning POH Ending POH	- \$291,827.58		
	Inventory		Litaling i Oit	- <b>\$286,623.65</b> (all cash)		
	PTC			(am dadii)		
	Not.Cred.					
	Notice of	Χ	Guardian	- waives		
	Hrg	^				
	Aff.Mail	Χ	Petitioner requests	the Court waive		
	Aff.Pub.		future accounts for			
	Sp.Ntc.		guardianship estate	e.		
	Pers.Serv.					
	Conf.					
	Screen					
	Letters					
	Duties/Supp					
	Objections					
	Video					
	Receipt					
<b> </b>	CI Report	inci				
✓	2620 Non-orig	jiridi				
	Order	Χ				
	Aff. Posting					
	Status Rpt					
	UCCJEA					
	Citation					
	FTB Notice					

#### **NEEDS/PROBLEMS/COMMENTS:**

- 1. Petition shows that all cash of the Guardianship Estate is held in a sinale blocked account valued at \$286,623.65. Petitioner will need to reduce the amount of the single bank account from its current balance of **\$286,623.65** to a maximum of **\$250,000.00** in order for the bank accounts to be insured by the Federal Deposit Insurance Corporation (FDIC), which has a coverage limit of \$250,000.00 per single account. Petitioner did not comply with the Court's Minute Order dated 3/4/2015 stating that the Court orders that the funds be placed into two fully insured blocked accounts. Order to Deposit Money Into Blocked Account filed 3/9/2016 indicates Petitioner was ordered to deposit \$200,000.00 into one account, and to deposit all remaining funds of ~\$90,000.00 into a separate account.
- 2. Notice of Hearing has not been filed showing proof of notice to the ward,

  GABRIELLA KRYSTAL SIMENTAL, pursuant to §§ 2621 and 1460. However, Court may excuse notice to the ward under Probate Code § 1460.1, if the Court determines that notice was properly given to a parent or guardian with whom the minor resides; or that the petition is brought by a parent or guardian with whom the minor resides. If Court confirms that the ward resides with the Petitioner, Court may excuse proof of service of notice to the ward.

Reviewed by: LEG
Reviewed on: 8/1/16
Updates:
Recommendation:
File 4- Simental

Jaech, Jeffrey A. (for Jennifer A. Williamson – Executor)

#### Probate Status Hearing RE: Filing of First Account or Petition for Final Distribution

DOD: 9/22/14	JENNIFER A. WILLIAMSON, Sister, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor with Full IEAE	
	without bond on 11/3/14 and Letters	Need first account or petition for
	issued on 11/10/14.	final distribution pursuant to
0 1 ( 01071 (	=	Probate Code §12200.
Cont. from 010716	Notice of Setting Status Hearing filed	
Aff.Sub.Wit.	1/22/15 set this status hearing re the	
Verified	filing of the first account or petition for	
Inventory	final distribution.	
PTC	Status Report filed 12/9/15 states the	
Not.Cred.	estate includes an undivided one-half	
Notice of	interest in the decedent's residence in	
Hrg	Fresno which must be sold to pay estate	
Aff.Mail	expenses. The property has been listed	
Aff.Pub.	with a broker for sale since approx.	
Sp.Ntc.	January 2015. The price has been	
Pers.Serv.	reduced several times, but it remains unsold. The Executor requests the status	
Conf.	hearing be continued for six months to	
Screen	allow the decedent's interest in the	
Letters	residence to be sold.	
Duties/Supp	]	
Objections	Status Report filed 7/28/16 states the	
Video	property has been sold and escrow closed last week. Some matters remain	
Receipt	unresolved such as a dispute with the	
CI Report	co-owner of the property over the	
9202	liability for expenses. Executor intends to	
Order	resolve all matters as soon as possible	
Aff. Posting	and file the petition for final distribution.	Reviewed by: skc
Status Rpt	As such, a three (3) month continuance	<b>Reviewed on:</b> 7/29/16
UCCJEA	is requested.	Updates:
Citation		Recommendation:
FTB Notice		File 5- Williamson

### 6 Maggie Hooker (Estate)

Case No. 14CEPR00951

Attorney Fanucchi, Edward L. (for Herminia Hawkins – Petitioner – Executor)

First and Final Account and Report of Executor and Petition for its Settlement;

Allowance of Compensation to Executor and Attorneys for Ordinary and Extraordinary Services;

Reimbursement of Costs Advanced and for Final Distribution

DOD: 09/09/2016			HERMINIA HAWKINS, Executor,	is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 09/09/2014 - 06/15/2016		
			A cooughting	\$100.0E7.41	
Со	nt. from		S	\$100,057.41 \$65,000.00	
	Aff.Sub.Wit.		Ending POH - :	\$94,040.48	
✓	Verified		(cash)		
✓	Inventory			\$4,000.00	
	PTC		(statutory)		
✓	Not.Cred.		Executor costs - \$3,882.8	<b>7</b> (for	
1	Notice of		maintaining residence, insuran	ice, utilities)	
<u> </u>	Hrg Aff.Mail	w/	Attorney -	\$4,000.00	
<b>✓</b>		W/	(statutory)		
	Aff.Pub. Sp.Ntc.		Attorney x/o -	\$1,265.00	
	Pers.Serv.		(extraordinary fees in connect		
	Conf.		of real property)		
	Screen		Costs -	\$1,731.50	
✓	Letters 05/21/	15	(filing fees, probate referee, pu	ublication,	
	Duties/Supp		certified copies)		
-	Objections		9	\$500.00	
	Video Receipt		(taxes)		
	CI Report Distribution, pursuant to Decedent's Will, is		lent's Will, is		
✓	9202		to:		
	Order		Herminia Hawkins - \$32,222.36		
	Aff. Posting				Reviewed by: LV
	Status Rpt UCCJEA		Myrna Campbell - \$32,222.36		Reviewed on: 08/01/2016 Updates:
	Citation				Recommendation:
1	FTB Notice				File 6- Hooker

Attorney Gary G. Bagdasarian (for Connie Mekealian, Administrator)

#### Probate Status Hearing Re: Proof of Proceeds in Blocked Account

DOD: 2/27/2014		CONNIE MEKEALIAN, niece, was appointed Administrator with Limited IAEA without bond	NEEDS/PROBLEMS/COMMENTS:
		on 11/19/2015.	OFF CALENDAR
Co	ont. from 070716	Order to Deposit Money into Blocked	Receipt and Acknowledgment
	Aff.Sub.Wit.	Account filed 5/31/2016 authorizes deposit of the net proceeds from the sale of real	of Order for Deposit of Funds into Blocked Account filed
	Verified	property.	7/20/2016.
	Reappraisal		, , , , , , , , , , , , , , , , , , ,
	PTC	First Amended Order Confirming Sale of Real Property filed 6/20/2016 confirmed the sale	
	Not.Cred.	of real property for \$129,500.00, with net sale	
	Notice of	proceeds to be deposited into a blocked	
	Hrg	account.	
	Aff.Mail	Chatan Daniel Clark 7/5/0015 shakes a First	
	Aff.Pub.	Status Report filed 7/5/2015 states a First  Amended Order Confirming Sale was filed	
	Sp.Ntc.	6/20/2016 as a result of an Ex Parte	
	Pers.Serv.	Application filed with the Court explaining	
	Conf.	the vesting of the buyer; Attorney	
	Screen	Bagdasarian was on vacation until	
	Letters	6/29/2016, at which time a certified copy of	
	Duties/Supp	the First Amended Order Confirming Sale	
	Objections	was provided to the Escrow Officer at Fidelity	
	Video	National Title Company, who indicates that	
-	Receipt	the sale should close on Friday [July] 8, 2016;	
-	CI Report 9202	request is made for an additional <b>21 days</b> to file a Receipt and Acknowledgment of	
	Order	Order for the Deposit of Money Into Blocked	
	Aff. Posting	Account.	Reviewed by: LEG
	Status Rpt		Reviewed by: LLG Reviewed on: 8/1/16
	UCCJEA	-	Updates:
	Citation	1	Recommendation:
	FTB Notice		File 7- Mekealian

Case No. 15CEPR01062

8 Jocelyn Zamora Diaz (GUARD/P) Co Guardian/Petitioner: Maria Guadalupe Andrade de Zamora (Pro per)

Guardian/Petitioner: Antonio Zamora Cuellar (Pro per)

#### Petition for Termination of Guardianship

			MARIA GUADALUPE ANDRADE DE ZAMORA and	NEEDS/PROBLEMS/COMMENTS:
			ANTONIO ZAMORA CUELLAR, paternal	
			grandparents/guardians, are petitioners.	1. Need Notice of Hearing.
Со	nt. from		Petitioners were appointed co-guardians of the minor on 1/7/2016.	Need proof of service of     Notice of Hearing <u>or</u> consents and waivers of
<b>√</b>	Verified		Court Investigator report filed 7/26/2016.	notice <u>or</u> declarations of due diligence for:
	Inventory PTC			a. Jocelyn Zamora Diaz (ward)
	Not.Cred.		See petition for details.	b. Juan Antonio Zamora Andrade (father)
	Notice of Hrg	Х		c. Laura Catalina Diaz Becerra (mother)
	Aff.Mail	Χ		•
	Aff.Pub.			d. Gonzalo Diaz Esqueda (maternal
	Sp.Ntc.			grandfather)
	Pers.Serv.			e. Maria Del Socorro
	Conf. Screen			Becerra Araiza (maternal
	Letters			grandmother)
	Duties/Supp			,
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: SEF
	Status Rpt			<b>Reviewed on:</b> 8/1/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 8- Diaz
				0

## 9 DeAndra Lemarr Rogers (CONS/P)

Petitioner: Willie Jean Bass (pro per)

#### Petition for Appointment of Probate Conservator

			TEMPORARY EXPIRES 8/4/16	NEEDS/PROBLEMS/COMMENTS:
			WILLIE JEAN BASS, mother, is petitioner	Court Investigator advised rights on 01/22/16.
	nt. from 052616, 016	,	Please see petition for details.	Voting rights affected, need Minute Order.
	Aff.Sub.Wit.		Court Investigator filed a report on	
1	Verified		02/04/16.	
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/2/16
	UCCJEA			Updates:
✓	Citation			Recommendation:
	FTB Notice			File 9- Rogers

Case No. 15CEPR01213

Attorney: J. Stanley Teixeira (for Petitioner Michele O. Spencer)

First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance of Statutory Commissions and for Final Distribution

DOD: 10/15/15		MICHELE O. SPENCE	<b>R</b> , Adm	ninistrator, is	NE	EDS/PROBLEMS/COMMENTS:
		petitioner.  Account period: 10/	/15/15	- 6/20/16	1.	Stephen Diebert was appointed as the probate referee for this matter pursuant to the order
Co ✓	Aff.Sub.Wit.  Verified	Accounting Beginning POH Ending POH	- -	\$503,723.49 \$490,000.00 \$470,414.39		dated 2/16/16. However, Peter Jensen completed the inventory and appraisal. The inventory and appraisal must be completed by
✓	Inventory	Administrator	-	Waives		the appointed probate referee.
<b>√</b>	PTC Not.Cred.	Attorney (statutory)	-	\$13,070.00	2.	Distributeee, Paul Oesterle's address is listed as being in
<b>√</b>	Notice of Hrg Aff.Mail W/	Costs (filing fees, publications		<b>\$1,864.00</b> obate		Canada. Probate Code §8113 states that if property will pass to a citizen of a foreign country, notice shall be given to a
	Aff.Pub.  Sp.Ntc.	referee, certified co	-	\$1,000.00		recognized diplomatic or consular official of the foreign country maintaining an office in
	Pers.Serv.	Distribution, pursuan succession, is to:	it to int	estate		the United States.
_	Screen 2/16/16	Michele O. Spencer				
	Duties/Supp	Stephen Oesterle, M Schlichtenmyer, Eller	n Áelir	ng, Christin		
	Objections Video	Espinola, Carla Oest Maureen Oesterle -				
	Receipt CI Report	Christopher Wedge Wedge - \$22,724.02				
1	9202	γ - γ - γ - γ - γ - γ - γ - γ - γ - γ -				
1	Order					
	Aff. Posting				_	viewed by: KT
	Status Rpt UCCJEA					viewed on: 8/2/16 dates:
	Citation				_	commendation:
1	FTB Notice				File	e 10- Oesterle

## 11 Virginia Anderson (Estate)

Case No. 16CEPR00069

Attorney: Eliot S. Nahigian (for Executor – Kevin J. Anderson)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 10/29/2015	KEVIN J. ANDERSON, son, was	NEEDS/PROBLEMS/COMMENTS:
555. 15/27/2015	appointed executor with full IAEA	TTEES, I NOBELITIS, COMMILITIS.
	without bond on 3/3/2016.	
	Letters issued 3/3/2016.	
Cont. from		OFF CALENDAR
Aff.Sub.Wit.	Minute order dated 3/3/2016 set this status hearing for filing of the I&A.	Final I&A filed 4/13/2016.
Verified	statos flediling for filling of the t&A.	
Inventory		
PTC	1	
Not.Cred.	1	
Notice of	1	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report	4	
9202	4	
Order		
Aff. Posting	1	Reviewed by: SEF
Status Rpt	1	Reviewed on: 8/1/2016
UCCJEA	1	Updates:
Citation		Recommendation:
FTB Notice		File 11- Anderson

#### 12 Mason Gonzales (GUARD/P)

Attorney: Julie Hicks (for Petitioner Catherine Bernal)

Petitioner: Valentin Bernal (pro per)

Attorney: Amy Lopez (for Objector/Father Adrian Mendoza)

#### Petition for Appointment of Guardian of the Person

Case No. 16CEPR00317

#### TEMPORARY was terminated on 5/25/16 **NEEDS/PROBLEMS/COMMENTS: CATHERINE BERNAL**, maternal Continued from 6/9/16. Minute order grandmother, and VALENTIN BERNAL, step states matter is continued due to the maternal grandfather, is petitioner. late filed document. The Court Cont. from 052516, orders that the minor is to remain with Please see petition for details. 060916 his father between now and 8/4/16. Aff.Sub.Wit. 1. Need proof of service of the Verified Notice of Hearing along with a Inventory copy of the petition or consent **PTC** and waiver of notice or declaration of due diligence for: Not.Cred. a. Paternal grandparents Notice of b. Maternal grandfather. Hrg Aff.Mail Χ 2. Confidential Guardian Screening Aff.Pub. form for both petitioners is Sp.Ntc. incomplete at #1 whether or not they are required to register as a Pers.Serv. sex offender. Conf. Screen Letters Duties/Supp **Objections** Video Receipt **CI Report** 9202 Order Aff. Posting Reviewed by: KT Status Rpt **Reviewed on:** 8/2/16 **UCCJEA Updates: Recommendation:** Citation **FTB Notice** File 12- Gonzales

Petitioner

Gretta Christa (Pro Per, daughter)

Attorney Curtis Rindlisbacher (Court-appointed for Conservatee)

### Petition for Appointment of Probate Conservator of the Person

			Petition for Appointment of Prob	Date Conservator of the reison
			GRETTA CHRISTA, daughter, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests	
			appointment as Conservator of	Court Investigator Advised Rights on
			the Person.	5/24/2016.
	1.6	<del></del>		7 - 7 - 5 - 5 - 5
	ont. from 06021	6,	~Please see Petition for details~	Continued from 6/30/2016. Minute Order
06	3016			states Mr. Rindlisbacher needs more time, as
	Aff.Sub.Wit.			he was just recently appointed as counsel for
✓	Verified		Court Investigator's Report was	the proposed conservatee.
	Inventory		filed on 6/27/2016.	
-		Χ	., ., .	Need Conservatorship Video Viewing
-	Cap. Dec.	^		Certificate pursuant to Local Rule
	Not.Cred.			7.15.9(A). Court's website
✓	Notice of			http://www.fresno.courts.ca.gov/Probate/conservatorship provides a link to view the video and a
	Hrg			printable receipt for viewing by the
✓	Aff.Mail	W/		Petitioner that must be filed with the
	Aff.Pub.			Court.
	Sp.Ntc.			
-				
✓	Pers.Serv.			
1	Conf.			
	Screen			
1	Letters			
ا				
✓	Duties/Supp			
	Objections			
	Video	Χ		
	Receipt	, ,		
1	CI Report			
<u> </u>	-			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 8/1/16
	UCCJEA			Updates:
	Citation			Recommendation:
<b>√</b>				
	FTB Notice			File 13- Petrossian
				10

## 14 Inez Talley (Estate)

#### Case No. 16CEPR00566

Attorney Fletcher, Robert J (of Tulare, Ca. for Russell Mayfield – Petitioner – Grandson)

Petition for Probate of Will and for Letters Testamentary

executor without bond, is petitioner.  Full IAEA – ok  Full IAEA – ok  Will dated: 11/18/1998  Aff.Sub.Wit. s/p  Verified  Verified  Verified  Volication: The Reedley Exponent  Estimated value of the Estate: Real property - \$233,345.00  Notice of Hrg  Aff.Nub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Veletters  Volideo Receipt  Cal Report  9202  Vorder  Aff. Posting  Status Rpt  UCCJEA  Minute Order of 07/21/2016: Verified declaration by petitioner needs to be filed by 08/01/2016.  Note: An Inventory and Appraisal was filed on 05/27/2016, however it is incomplete as the Statement of the Bond portion was not complete, norwer it signed by the Attorney; the caption does not if this is the Final Inventory and Appraisal: and it is not completed at #3 regarding property tax certificate. Probate Referee: Steven Diebert  Probate Referee: Steven Diebert  Probate Referee is the Statement of the Bond portion was not complete, norwer it signed by the Attorney; the caption does not if this is the Final Inventory and Appraisal; and it is not complete at #4 regarding property tax certificate. Probate Referee: Steven Diebert  Probate Referee: Steven Diebert  Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status  Hearings  Reviewed by: LV Reviewed on: 08/01/2016  Updates:	DC	D: 05/27/2006		RUSSELL MAYFIELD, grandson/named	NEEDS/PROBLEMS/COMMENTS:
Full IAEA – ok  Cont. from 072116  Aff. Sub. Wift. s/p  Verified  Vierified  Voerified  Vierified  Vierified  Voerified  Vierified  Voerified  Vierified  Vierified				_	
Cont. from 072116  Aff. Sub. Wit.				·	Minute Order of 07/21/2016: Verified
Conf. from 072116				Full IAEA – ok	
Aff. Sub. Wift. S/p  ✓ Verified  ✓ Inventory  PTC  Not.Cred.  ✓ Notice of Hrg  ✓ Aff. Mail W/  ✓ Aff. Pub.  Sp. Ntc.  Pers. Serv.  Conf. Screen  ✓ Letters  ✓ Duties/Supp  Objections  Video Receipt  CI Report  ✓ Py202  ✓ Order  Aff. Posting  Status Rpt  Verified  ✓ Probate Referee: State States the Statement of the Estate: incomplete at the Statement of the Bond portion was not complete, nor we if signed by the Attorney; the caption does not if this is the Final Inventory and Appraisal: and if is not completed at the State state state state statement of the Bond portion was not complete, nor we if signed by the Attorney; the caption does not if this is the Final Inventory and Appraisal: and if is not completed at the segarding property tax certificate.  Probate Referee: Steven Diebert  Probate Referee, however Rick P. Smith as the Probate Referee for this case pursuant to Probate Code § 8702 base on the appraisal work having already been completed by him.  Please see additional page for Status Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:		nt from 072114			filed by 08/01/2016.
Residence: Reedley Publication: The Reedley Exponent    True				Will dated: 11/18/1998	Note: An Inventory and Appraisal was
Verified			s/p	Posidonas Poodlov	· · ·
✓ Inventory	✓	Verified		·	
PTC	1	Inventory		Toblication. The Recaley Exponent	·
Real property - \$233,345.00  Not.Cred.  Not.Cred.  Notice of Hrg  Aff.Mail W/  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  ✓ Letters  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  Real property - \$233,345.00  does not if this is the Final Inventory and Appraisal; and if is not completed at #5 regarding property tax certificate. Pursuant to the Court's policy Steven Diebert should be the designated Probate Referee, however Rick P. Smith completed the appraisal. Therefore, Court may designate RICK P. SMITH as the Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	Ě	DTC		Estimated value of the Estate:	, , , , , , , , , , , , , , , , , , ,
Notice of Hrg  ✓ Aff.Mail W/ ✓ Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen ✓ Letters  ✓ Duties/Supp  Ci Report  Ci Report  7 202 ✓ Order  Aff. Posting  Status Rpt  Volace Referee: Steven Diebert  Afpraisal; and it is not completed at #8 regarding property tax certificate. Pursuant to the Court's policy Steven Diebert should be the designated Probate Referee, however Rick P. Smith completed the appraisal. Therefore, Court may designate RICK P. SMITH as the Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status  Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	l <del></del>			· · · · · · · · · · · · · · · · · · ·	, , , , , , , , , , , , , , , , , , , ,
Voltice of Hrg	<u> </u>	l			Appraisal; and it is not completed at #5
Probate Referee: Steven Diebert    Aff.Mail   W/	✓				···
✓ Aff.Pub. Diebert should be the designated Probate Referee, however Rick P. Smith completed the appraisal. Therefore, Court may designate RICK P. SMITH as the Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.   ✓ Letters ✓ Duties/Supp   Objections Video Receipt   CI Report Please see additional page for Status Hearings   ✓ Order Aff. Posting   Status Rpt Reviewed by: LV   Reviewed on: 08/01/2016 Updates:	-		,	Probate Referee: Steven Diebert	
Sp.Ntc.  Pers.Serv.  Conf. Screen  ✓ Letters  ✓ Duties/Supp  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Completed the appraisal. Therefore, Court may designate RICK P. SMITH as the Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	✓	Att.Mail	W/		·
Sp.Ntc. Pers.Serv. Conf. Screen  ✓ Letters  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting Status Rpt  UCCJEA  Conf. Screen  Court may designate RICK P. SMITH as the Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status Hearings  Reviewed by: LV Reviewed on: 08/01/2016  Updates:	1	Aff.Pub.			Probate Referee, however Rick P. Smith
Pers.Serv.  Conf. Screen  ✓ Letters  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Conf. Screen  Athe Probate Referee for this case pursuant to Probate Code § 8902 base on the appraisal work having already been completed by him.  Please see additional page for Status  Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  UCCJEA	Ě	C:- NH			completed the appraisal. Therefore,
Conf. Screen  ✓ Letters  ✓ Duties/Supp  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA					Court may designate <b>RICK P. SMITH</b> as
Screen  ✓ Letters  ✓ Duties/Supp  Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Duties/Supp  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:					the Probate Referee for this case
✓ Letters   ✓ Duties/Supp   Objections   Video Receipt   CI Report   9202 ✓ Order   Aff. Posting   Status Rpt   UCCJEA    Please see additional page for Status  Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:					pursuant to Probate Code § 8902 based
✓ Duties/Supp   Objections   Video Receipt   CI Report   9202 ✓ Order   Aff. Posting   Status Rpt   UCCJEA    Please see additional page for Status  Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	-				on the appraisal work having already
Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Please see additional page for Status  Hearings  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	✓	Leffers			been completed by him.
Objections   Please see additional page for Status	1	Duties/Supp			
Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	Ě	Objections			· · · · · · · · · · · · · · · · · · ·
Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:	<b> </b>				<u>Hearings</u>
CI Report           9202           ✓ Order           Aff. Posting           Status Rpt           UCCJEA    Reviewed by: LV  Reviewed on: 08/01/2016  Updates:					
9202					
✓ Order         Reviewed by: LV           Status Rpt         Reviewed on: 08/01/2016           UCCJEA         Updates:	<u> </u>	-			
Aff. Posting  Status Rpt  UCCJEA  Reviewed by: LV  Reviewed on: 08/01/2016  Updates:					
Status Rpt UCCJEA Reviewed on: 08/01/2016 Updates:	✓	Oraer			
UCCJEA Updates:		Aff. Posting			Reviewed by: LV
		Status Rpt			<b>Reviewed on:</b> 08/01/2016
Citation Recommendation:		UCCJEA			Updates:
		Citation			Recommendation:
FTB Notice File 14- Talley		FTB Notice			File 14-Talley

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#### 14(additional page) Inez Talley (Estate)

Case No. 16CEPR00566

Note: If the petition is granted status hearings will be set as follows:

- Thursday, 01/05/2017 at 9:00a.m. in Dept. 303 for the filing of the <u>Corrected</u> Inventory and Appraisal <u>and</u>
- Thursday, 10/05/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

## 15 D'Andre Campbell (GUARD/P)

Petitioner: Marie Latea Adams (Pro per)

#### Case No. 16CEPR00588

#### Petition for Appointment of Guardian of the Person

Petition for Appointment of Guardian of the Person				
	TEMPORARY DENIED	NEEDS/PROBLEMS/COMMENTS:		
	MARIA ADAMS, paternal aunt, is petitioner	Need Notice of Hearing.		
Cont. from Aff.Sub.Wit.	Court Investigator report filed 7/12/2016.	2. Need proof of personal service at least 15 days before the hearing		
✓ Verified		of Notice of Hearing with copy of petition <u>or</u> consents and waivers		
Inventory PTC	See petition for details.	of notice <u>or</u> declarations of due diligence for:		
Not.Cred.	see pennon for defans.	a. Dale Gilmore (father) – unless the Court excuses notice		
Notice of X		b. Erica Campbell (mother)		
Aff.Mail X		3. Need proof of service at least 15		
Aff.Pub.		days before the hearing of Notice		
Sp.Ntc.		of Hearing with copy of petition <u>or</u>		
Pers.Serv. X		consents and waivers of notice <u>or</u> declarations of due diligence for:		
✓ Conf. Screen		a. Paternal grandfather		
✓ Letters		b. Pauline Williams (paternal grandmother)		
✓ Duties/Supp		c. Maternal grandparents		
Objections				
Video Receipt				
✓ CI Report				
9202				
✓ Order				
Aff. Posting		Reviewed by: SEF		
Status Rpt		<b>Reviewed on:</b> 8/1/2016		
✓ UCCJEA		Updates:		
Citation		Recommendation:		
FTB Notice		File 15- Campbell		
		15		

### 16 Clark Melvin, Seth Melvin (GUARD/P)

Case No. 16CEPR00589

Petitioner Jordan, Paulette (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

Ck	ark Age: 6	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Set	h Age: 6		
		PAULTETTE JORDAN, maternal grandmother, is petitioner.	Note: Paternal Grandmother, Marsha Melvin, filed a competing petition on 08/02/2016. Hearing is set for 10/03/2016.
Со	nt. from		00/02/2010. Healing is serior 10/00/2010.
	Aff.Sub.Wit.		1. Need Notice of Hearing.
✓ ————————————————————————————————————	Verified  Inventory PTC Not.Cred.  Notice of X Hrg  Aff.Mail X Aff.Pub.  Sp.Ntc. Pers.Serv. X Conf. Screen Letters	Please see petition for details	<ol> <li>Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:         <ul> <li>Paul T. Melvin (Father)</li> <li>Krista Melvin (Mother)</li> </ul> </li> <li>Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for</li> </ol>
✓ ✓	Duties/Supp Objections Video Receipt		Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:  • David Melvin (Paternal Grandfather)  • Marsha Melvin (Paternal
1	CI Report	1	Grandmother)
	9202	•	<ul> <li>Michael H. Reynolds</li> </ul>
/	Order Order		(Maternal Grandfather)
	Aff. Posting	-	Reviewed by: LV
	Status Rpt		<b>Reviewed on:</b> 08/02/2016
1	UCCJEA		Updates:
	Citation	j	Recommendation:
	FTB Notice		File 16- Melvin
			1.4

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#### 17 Francine Conae (Estate)

Case No. 16CEPR00639

Attorney Istanboulian, Flora (for Carol Ann Madruga – Petitioner)

Petition for Probate of Will and for Letters of Administration with Will Annexed (Lost Will);

Authorization to Administer Under the IAEA

DOD: 05/29/2016					
Co	nt. from				
Aff.Sub.Wit.					
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
1	Notice of Hrg				
1	Aff.Mail				
✓	Aff.Pub.	w/			
	Sp.Ntc.				
	Pers.Serv.				
	Conf.				
	Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
<b>√</b>	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				

CAROL ANN MADRUGA, is petitioner and requests appointment as Administrator with Will Annexed, without bond.

Full IAEA - o.k.

Lost Will dated: 05/02/2003

Residence: Fresno

Publication: The Business Journal

#### **Estimated value of the Estate:**

Personal property - \$14,900.00

Real property - \$220,000.00

Less encumbrances - \$11,000.00

Total - \$224,900.00

Probate Referee: Steven Diebert

Petitioner states: decedent, Francine Conae, left a last will dated 05/02/2003, which Petitioner believes and therefore alleges is the last will of the decedent. The will has never been revoked, but is lost. Petitioner has made an extensive search of the decedent's house trying to locate the will, but has been unsuccessful.

#### **NEEDS/PROBLEMS/COMMENTS:**

- Probate Code §6124 states if the
  testator's will was last in the testator's
  possession, the testator was competent
  until death, and neither the will nor a
  duplicate original of the will can be
  found after the testator's death, it is
  presumed that the testator destroyed the
  will with intent to revoke it. This
  presumption is a presumption affecting
  the burden of producing evidence.
  Petitioner has not provided anything to
  rebut the presumption that the will was
  not destroyed with the intent to revoke.
- 2. Order does not comply with the Probate Code §8223, copy of the will must be included with the order.

## <u>Note:</u> If the petition is granted status hearings will be set as follows:

- Thursday, 01/05/2017 at 9:00a.m. in **Dept. 303** for the filing of the Inventory and Appraisal <u>and</u>
- Thursday, 10/05/2017 at 9:00a.m. in **Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Reviewed by: LV

Reviewed on: 08/02/2016

Updates:

Recommendation:

File 17- Conae

18 Attorney Attorney

### The Alfred Schengel Testamentary Trust Case No. 16CEPR00654

Rube, Melvin K. (for Petitioners Christopher Kennedy and Curtis Kennedy) Burnside, Leigh W. (for Successor Trustee John A. Schengel – Objector)

Petition for Instructions to Trustee, to Compel an Accounting, Removal of Trustee for Breach of Trust and Appointment of Successor Trustee

	CHRISTOPHER KENNEDY and CURTIS KENNEDY, NEEDS/PROBLEMS/				
		vested remainder beneficiaries, are Petitioners.	COMMENTS:		
		Petitioners state the Alfred Schengel Testamentary Trust was created by Judgment entered 11/20/80	1. Need order.		
		in the Estate of Alfred Schengel 0250035-3 under	i. Need older.		
	Aff.Sub.Wit.	the terms of Alfred Schengel's Will (Judgment and	Note: If granted, the		
~	Verified	➡ Will attached).	Court will set status		
	Inventory	Langra E Sahangal / Sahangal) 00 is the sunjuing	hearings for the filing of		
	PTC	Lenore F. Schengel (L. Schengel), 92, is the surviving spouse of Alfred Schengel, and the mother of John	the bond by the successor trustee and		
	Not.Cred.	Schengel (Respondent) and Constance Kennedy	the filing of an		
~	Notice of	(C. Kennedy), deceased. Petitioners are the	accounting by the		
	Hrg	children of Constance Kennedy.	former trustee as		
<b>&gt;</b>	Aff.Mail v	Respondent and C. Kennedy are the remainder	appropriate.		
	Aff.Pub.	beneficiaries of the trust. Petitioners, as the surviving			
	Sp.Ntc.	issue of C. Kennedy, are vested remainder			
	Pers.Serv.	beneficiaries.			
	Conf.	Potitioners state L Schengel was diagnosed with			
	Screen	Petitioners state L. Schengel was diagnosed with dementia in 2013 or 2014, and currently resides in			
	Letters	the memory care section of Cottonwood Court.			
	Duties/Supp	Her living expenses there are \$4,590/month.			
~	Objections	<b>_</b>			
	Video	The trust provides that the trustee shall pay to or			
	Receipt	use for the benefit of L. Schengel so much principal as suitable or necessary for her maintenance and			
	CI Report	support. See Articles Sixth and Seventh.			
	9202				
	Order X Aff. Posting	As of 1/31/16, the trust estate contained a Morgan	Povioused by ske		
		Stanley Active Assets Account with a value of \$444,802.77, which account was held in the names	Reviewed by: skc		
$\parallel$	Status Rpt UCCJEA	of C. Kennedy and Respondent as co-trustees.	Reviewed on: 8/2/16 Updates:		
	Citation		Recommendation:		
	FTB Notice	Prior to her death on 1/14/16, C. Kennedy handled	File 18- Schengel		
		all of L. Schengel's finances and financial matters	io conongei		
		and paid the monthly cost for the board and care of L. Schengel in a timely manner. Invoice No. 7206			
		in the amount of \$4,590.00 was paid by C. Kennedy			
		to Cottonwood Court on 1/7/16.			
		Petitioners state Respondent has intentionally			
		declined to act in compliance with the terms of the trust in that he intentionally and willfully refused			
		to pay the living expenses of L. Schengel for the			
		months of February through April 2016 amounting			
		to \$13,770.00.			
		SEE ADDITIONAL PAGES			

### 18 The Alfred Schengel Testamentary Trust Case No. 16CEPR00654

**Page 2 – Petitioners state** on 4/22/16, Cottonwood Court sent a written itemized statement to Respondent at his address, which shows an outstanding balance of \$18,360.00 through May 2016. The balance of \$13,770.00 through April 2016 was past due, and \$4,590.00 for May was due and payable on 5/1/16.

On 4/24/16, in order to prevent Cottonwood Court from evicting L. Schengel, Petitioner Christopher Kennedy paid the past due amount of \$13,770.00 out of his own personal assets, and subsequently made an oral demand upon Respondent to reimburse him the \$13,770.00, which Respondent failed and refused and continues to fail and refuse to do.

Petitioner's counsel sent a letter dated 5/24/16 to Respondent's address demanding reimbursement and that Respondent immediately pay Cottonwood Court's May invoice of \$4,590.00, which became due and owing on 5/10/16.

As of 6/16/16, Respondent has not paid L. Schengel's living expenses at Cottonwood Court for May and June 2015, which total \$9,180.00, once again subjecting L. Schengel to eviction.

Petitioners state Respondent's refusal to pay L. Schengel's living expenses and reimburse Petitioner for his payment thereof amounts to a violation of the trust and therefore a material breach of the trust. By reason of Respondent's conduct as described above, Respondent has demonstrated unfitness to serve as trustee and his removal and appointment of a successor trustee is necessary for the future protection and proper administration of the trust.

Upon his removal, there will be a vacancy, as C. Kennedy is deceased. The trust does not provide a practical method for appointing a trustee and does not name a person to fill the vacancy. Petitioners therefore nominate **BRUCE D. BICKEL** as successor trustee. See consent at Exhibit 6.

#### Petitioners pray for an order:

- 1. Instructing John A. Schengel, as trustee of the Alfred Schengel Testamentary Trust, to:
  - a. Immediately pay from the assets of the Alfred Schengel Testamenatry Trust the total amount of \$9,180.00 to Cottonwood Court for the months of May and June 2016;
  - b. Immediately pay Petitioner Christopher Kennedy from the assets of the Alfred Schengel Testamentary Trust the total amount of \$13,770.00 as reimbursement for his payment to Cottonwood Court in the amount of \$13,770.00;
  - c. Pay from the assets of the Alfred Schengel Testamentary Trust the monthly costs for L. Schengel's living expenses at Cottonwood Court by the 10<sup>th</sup> of every month for so long as L. Schengel resides at Cottonwood Court and for as long as John A. Schengel is the trustee of the Alfred Schengel Testamentary Trust;
  - d. Pay in a timely manner from the assets of the Alfred Schengel Testamentary Trust the monthly living expenses for L. Schengel at any subsequent facility should L. Schengel ever move from Cottonwood Court for so long as John A. Schengel is the trustee of the Alfred Schengel Testamentary Trust.
- 2. Removing John A. Schengel as Trustee of the Alfred Schengel Testamentary Trust;
- 3. Appointing Bruce D. Bickel as Successor Trustee of the Alfred Schengel Testamentary Trust and vesting him with all the powers vested in the office of the trustee under the trust instrument;
- 4. Requiring Bruce D. Bickel to give a surety bond in the amount of \$450,000.00 and that the cost of the bond be charged against the Alfred Schengel Testamentary Trust;
- 5. Compelling John A. Schengel to account fully for all trust property;
- 6. Compelling John A. Schengel to turn over to Bruce D. Bickel all original documents, deeds, bank and investment statements whether said statements are monthly, quarterly, or annual statements, all tangible and intangible personal property of the Alfred Schengel Testamentary Trust, and all bank accounts, investment accounts, mutual funds accounts, stocks, bonds, and keys to all real property that is an asset of the testamentary trust.;
- 7. Awarding Petitioners their attorney's fees and costs of the suit incurred herein; and
- 8. For such other orders as the Court may deem proper.

#### 18 The Alfred Schengel Testamentary Trust Case No. 16CEPR00654

Page 3 – Successor Trustee John A. Schengel's Objection filed 8/1/16 admits or denies various statements in the petition and states Lenore F. Schengel passed away on 7/11/16. Objector states that upon the death of his sister

(C. Kennedy), he became sole successor trustee. He was not represented by counsel and was unsure how to proceed. He consulted with an attorney re steps needed to administer the trust and began to carry out the instructions given to him. Mr. Schengel had no prior experience with such matters. Following the filing of the instant petition, Mr. Schengel retained Dowling Aaron Incorporated and is now being advised re his role and responsibilities as successor trustee.

Mr. Schengel states that because Mrs. Schengel's expenses at Cottonwood were paid by his sister, Mr. Schengel had no information regarding the cost of the facility or the amount of the monthly invoices. He took active steps to administer the trust in accordance with its terms: He attempted to gain access to the funds in a Union Bank account to pay Mrs. Schengel's expenses, but was unable to do so as the account was held in the name of Mrs. Schengel and C. Kennedy, individually. Upon advice, he completed the paperwork at Morgan Stanley, and understood there would be additional documents to sign before he could access the funds.

After being served with the petition, he was referred to the law office of Dowling Aaron Incorporated and retain said firm to assist with administration of his father's testamentary trust and his mother's trust. With the firm's guidance, he has begun administering the trusts, including paying his mother's expenses and the ongoing expenses of the trusts. Accordingly, he is acting appropriately in his role as trustee and following the terms of the trust.

Mr. Schengel received a statement from Cottonwood in late April 2016; however, at the time, he believed a long-term care policy paid her expenses. After some research, Mr. Schengel confirmed that there was such a policy, but that it paid monthly proceeds to the account at Union Bank that he could not access. He did not know that the Morgan Stanley funds could be used to pay the invoice.

Mr. Schengel states he was presented with documents supporting the allegation that Christopher Kennedy paid the outstanding amounts due to Cottonwood and has reimbursed him \$13,770 by delivering payment to his attorney, Melvin Rube, on 8/1/16, and he has now made full payment to Cottonwood for the entire outstanding amount.

Mr. Schengel states he took active steps to administer the trust as described above. Upon service of the petition, he retained Dowling Aaron Incorporated and has begun administering the trust and paying ongoing expenses. Accordingly, he is acting appropriately in his role as trustee.

The petition fails to state facts sufficient to support the request for his removal and for an accounting. He has rectified the situation by making full reimbursement to Petitioner, paying arrearage to Cottonwood Court, and by retaining counsel to assist with administration. Prior to the death of Mrs. Schengel on 7/11/16, Petitioners were not entitled to an accounting because she was the only beneficiary with right to distribution. Petitioners' allegations that he failed to reimburse Petitioner or pay Cottonwood Court – both debts that have now been paid in full – are not sufficient basis to compel accounting at this time. Mr. Schengel has an obligation to account annually to Petitioners for the period commencing 7/11/16, the day Mrs. Schengel passed away, and his first account is not due until next year unless he proposes to complete trust administration before that time.

#### Objector prays the Court issues an order as follows:

- 1. Denying the petition and all relief requested therein;
- 2. Granting Mr. Schengel reasonable costs of suit; and
- 3. Awarding any and all other relief the Court deems just and proper.

19 Attorney Attorney

### The Lenore F. Schengel Living Trust

Case No. 16CEPR00655

Rube, Melvin K. (for Petitioners Christopher Kennedy and Curtis Kennedy) Burnside, Leigh W. (for Successor Trustee John A. Schengel – Objector)

Petition for Instructions to Trustee, to Compel an Accounting, Removal of Trustee for Breach of Trust and Appointment of Successor Trustee

Age: 92		CHRISTOPHER KENNEDY and CURTIS KENNEDY, beneficiaries, are Petitioners.	NEEDS/PROBLEMS/ COMMENTS:
		Deficiones, die Femioneis.	COMMUNICIALIS.
		Petitioners state Lenore F. Schengel, Trustor, is 92,	1. Need order.
		and is the mother of John A. Schengel (Respondent)	
	Aff Cb \Wil	and Constance Kennedy (C. Kennedy). Trustor	Note: If granted, the
-	Aff.Sub.Wit.	established the revocable trust by executing a written trust instrument, the Lenore F. Schengel Living	Court will set status hearings for the filing of
	Verified	Trust, dated 11/2/99. Trustor was designated as the	the bond by the
	Inventory	initial trustee of the trust. Trustor amended the trust	successor trustee and
	PTC	on 12/17/07.	the filing of an
	Not.Cred.		accounting by the
~	Notice of	On 1/24/14, Trustor resigned as trustee and pursuant	former trustee as
	Hrg	to Article IV, C. Kennedy accepted appointment as trustee.	appropriate.
	Aff.Pub.	Trustee.	
		C. Kennedy died 1/14/16. Petitioners are informed	
	Sp.Ntc.	and believe and thereupon allege that as a result of	
	Pers.Serv.	her death, Respondent assumed the office of	
	Conf. Screen	successor trustee and is currently acting as sole	
	Letters	trustee.	
	Duties/Supp	Petitioners state although the trustor is living and as	
	Objections	trustor would hold power to revoke, Petitioners	
	Video	believe the trust is irrevocable because the trustor is	
	Receipt	legally incompetent to exercise her power to revoke	
	CI Report	or amend the trust as she has no understanding of the trust instrument or the nature or extent of the	
	9202	trust assets and is not capable of resisting undue	
	Order :	<b>=</b>	
	Aff. Posting	the trustee to manage the trust assets and to handle	Reviewed by: skc
	Status Rpt	her finances.	Reviewed on: 8/2/16
	UCCJEA	Petitioners are beneficiaries of the trust as the	Updates:
	Citation	urviving issue of C. Kennedy and as such have	Recommendation:
	FTB Notice	standing to bring this petition.	File 19- Schengel
		Petitioners state as of 1/31/16, the trust estate	
		contained a Morgan Stanley Active Assets Account	
		with a value of \$101,766.43, which account was held in the name of C. Kennedy Trustee of the Lenore F.	
		Schengel Living Trust.	
		SEE ADDITIONAL PAGES	

#### Page 2

**Petitioners state** the trustor's living expenses at Cottonwood Court are \$4,590/month. On 4/22/16, Cottonwood Court sent a written itemized statement to Respondent at his address, which shows an outstanding balance of \$18,360.00 through May 2016. The balance of \$13,770.00 through April 2016 was past due, and \$4,590.00 for May was due and payable on 5/1/16.

On 4/24/16, in order to prevent Cottonwood Court from evicting L. Schengel, Petitioner Christopher Kennedy paid the past due amount of \$13,770.00 out of his own personal assets, and subsequently made an oral demand upon Respondent to reimburse him the \$13,770.00, which Respondent failed and refused and continues to fail and refuse to do.

Petitioner's counsel sent a letter dated 5/24/16 to Respondent's address demanding reimbursement and that Respondent immediately pay Cottonwood Court's May invoice of \$4,590.00, which became due and owing on 5/10/16.

As of 6/16/16, Respondent has not paid L. Schengel's living expenses at Cottonwood Court for May and June 2015, which total \$9,180.00, once again subjecting L. Schengel to eviction.

The trust provides that during the trustor's lifetime, the entire net income, and principal as needed, shall be paid to or for the benefit of the trustor to maintain the standard of living that she enjoyed on the date of execution.

Petitioners state Respondent's refusal to pay L. Schengel's living expenses and reimburse Petitioner for his payment thereof amounts to a violation of the trust and therefore a material breach of the trust. By reason of Respondent's conduct as described above, Respondent has demonstrated unfitness to serve as trustee and his removal and appointment of a successor trustee is necessary for the future protection and proper administration of the trust.

The trust provides that if C. Kennedy should be unwilling or unable to act, John Alfred Schengel is nominated as successor trustee. Should all of named trustees be deceased, unable or unwilling to act, any beneficiary named herein may petition the superior court in the County of Fresno for the appointment of a successor trustee. Petitioners therefore nominate **BRUCE D. BICKEL** as successor trustee. See consent at Exhibit 7.

#### **SEE ADDITIONAL PAGES**

#### Page 3

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#### Petitioners pray for an order:

- 9. Instructing John A. Schengel, as trustee of the Lenore F. Schengel Living Trust, to:
  - a. Immediately pay from the assets of the Lenore F. Schengel Living Trust the total amount of \$9,180.00 to Cottonwood Court for the months of May and June 2016;
  - b. Immediately pay Petitioner Christopher Kennedy from the assets of the Lenore F. Schengel Living Trust the total amount of \$13,770.00 as reimbursement for his payment to Cottonwood Court in the amount of \$13,770.00;
  - c. Pay the monthly costs for L. Schengel's living expenses at Cottonwood Court by the 10<sup>th</sup> of every month for so long as L. Schengel resides at Cottonwood Court and for as long as John A. Schengel is the trustee of the Lenore F. Schengel Living Trust;
  - d. Pay in a timely manner from the assets of the Lenore F. Schengel Living Trust the monthly living expenses for L. Schengel at any subsequent facility should L. Schengel ever move from Cottonwood Court for so long as John A. Schengel is the trustee of the Lenore F. Schengel Living Trust.
- 10. Removing John A. Schengel as Trustee of the Lenore F. Schengel Living Trust;
- 11. Appointing Bruce D. Bickel as Successor Trustee of the Lenore F. Schengel Living Trust and vesting him with all the powers vested in the office of the trustee under the trust instrument;
- 12. Requiring Bruce D. Bickel to give a surety bond in the amount of \$105,000.00 and that the cost of the bond be charged against the trust;
- 13. Compelling John A. Schengel to account fully for all trust property;
- 14. Compelling John A. Schengel to turn over to Bruce D. Bickel all original documents, deeds, bank and investment statements whether said statements are monthly, quarterly, or annual statements, all tangible and intangible personal property of the trust, and all bank accounts, investment accounts, mutual funds accounts, stocks, bonds, and keys to all real property that is an asset of the trust.;
- 15. Awarding Petitioners their attorney's fees and costs of the suit incurred herein; and
- 16. For such other orders as the Court may deem proper.

Page 4 – Successor Trustee John A. Schengel's Objection filed 8/1/16 admits or denies various statements in the petition and states Lenore F. Schengel passed away on 7/11/16. Objector states that upon the death of his sister (C. Kennedy), he became sole successor trustee. He was not represented by counsel and was unsure how to proceed. He consulted with an attorney re steps needed to administer the trust and began to carry out the instructions given to him. Mr. Schengel had no prior experience with such matters. Following the filing of the instant petition, Mr. Schengel retained Dowling Agron Incorporated and is now being advised re his role and responsibilities as successor trustee.

Mr. Schengel states that because Mrs. Schengel's expenses at Cottonwood were paid by his sister, Mr. Schengel had no information regarding the cost of the facility or the amount of the monthly invoices. He took active steps to administer the trust in accordance with its terms: He attempted to gain access to the funds in a Union Bank account to pay Mrs. Schengel's expenses, but was unable to do so as the account was held in the name of Mrs. Schengel and C. Kennedy, individually. Upon advice, he completed the paperwork at Morgan Stanley, and understood there would be additional documents to sign before he could access the funds.

After being served with the petition, he was referred to the law office of Dowling Agron Incorporated and retain said firm to assist with administration of his father's testamentary trust and his mother's trust. With the firm's guidance, he has begun administering the trusts, including paying his mother's expenses and the ongoing expenses of the trusts. Accordingly, he is acting appropriately in his role as trustee and following the terms of the trust.

Mr. Schengel received a statement from Cottonwood in late April 2016; however, at the time, he believed a long-term care policy paid her expenses. After some research, Mr. Schengel confirmed that there was such a policy, but that it paid monthly proceeds to the account at Union Bank that he could not access. He did not know that the Morgan Stanley funds could be used to pay the invoice.

Mr. Schengel states he was presented with documents supporting the allegation that Christopher Kennedy paid the outstanding amounts due to Cottonwood and has reimbursed him \$13,770 by delivering payment to his attorney, Melvin Rube, on 8/1/16, and he has now made full payment to Cottonwood for the entire outstanding amount.

Mr. Schengel states he took active steps to administer the trust as described above. Upon service of the petition, he retained Dowling Aaron Incorporated and has begun administering the trust and paying ongoing expenses. Accordingly, he is acting appropriately in his role as trustee.

The petition fails to state facts sufficient to support the request for his removal and for an accounting. He has rectified the situation by making full reimbursement to Petitioner, paying arrearage to Cottonwood Court, and by retaining counsel to assist with administration. Prior to the death of Mrs. Schengel on 7/11/16, Petitioners were not entitled to an accounting because she was the only beneficiary with right to distribution. Petitioners' allegations that he failed to reimburse Petitioner or pay Cottonwood Court – both debts that have now been paid in full – are not sufficient basis to compel accounting at this time. Mr. Schengel has an obligation to account annually to Petitioners for the period commencing 7/11/16, the day Mrs. Schengel passed away, and his first account is not due until next year unless he proposes to complete trust administration before that time.

#### Objector prays the Court issues an order as follows:

- 4. Denying the petition and all relief requested therein;
- 5. Granting Mr. Schengel reasonable costs of suit; and
- 6. Awarding any and all other relief the Court deems just and proper.

Attorney Esraelian, Robyn L (for Nancy Ramos – Petitioner)

Petition for Letters of Administration and Authorization to Administer Under the IAEA

		The NAME of Administration and Authorization to	
DC	D: 10/09/2002	NANCY RAMOS, petitioner, requests	NEEDS/PROBLEMS/COMMENTS:
		appointment as Administrator with bond set	1 Datition on its modified and 110 of the
		at \$25,000.00.	1. Petitioner is not listed on #8 of the
		Full IAEA — o.k.	petition as required and it is unclear
Со	nt. from	FUITALA - O.K.	what the relationship is to the decedent.
	Aff.Sub.Wit.	Decedent died intestate	docodorii.
<b>√</b>	Verified	Residence: Fresno	Notice of Petition to Administer Estate indicates that Michelle Marple was
	Inventory	Publication: The Business Journal	served c/o Deann. Service must be
	PTC		· · · · · · · · · · · · · · · · · · ·
	Not.Cred.	Estimated value of the Estate:	directly on the individual. Service in
	Notice of	Real property - \$21,000.00	care of another person is insufficient
•	Hrg		pursuant to CA Rules of Court
	Aff.Mail w/	Probate Referee: Rick Smith	7.51(a)(1).
	,		Note: If the petition is granted status
✓	Aff.Pub.		hearings will be set as follows:
	Sp.Ntc.		• Thursday, 09/08/2016 at
	Pers.Serv.		9:00a.m. in Dept. 303 for the filing
	Conf.		of the Bond <b>and</b>
	Screen		TI 1 01 (05 (0017 10 00
✓	Letters		Thursday, 01/05/2017 at 9:00a.m.
1	Duties/Supp		in Dept. 303 for the filing of the
Ľ			Inventory and Appraisal <b>and</b>
	Objections		• Thursday, 10/05/2017 at
	Video		9:00a.m. in Dept. 303 for the filing
	Receipt		of the first account and final
	CI Report		distribution.
	9202		Purguant to Local Pulo 75 if the required
1	Order		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Aff. Posting		Reviewed by: LV
	Status Rpt	]	<b>Reviewed on:</b> 08/02/2016
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 20- Marple
			20

### 21 Donald I. Templer (Estate)

Case No. 16CEPR00669

Attorney Ramirez, Edward R., JR (for Diane Cercado – Petitioner – Friend) Attorney Cunningham, Nikole (for Mark Templer – Objector – Cousin)

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 06/02/2016			DIANE CERCADO, friend/named Executor	NEEDS/PROBLEMS/COMMENTS:
			without bond, is petitioner.	
			E HIAFA	Note: If the petition is granted status
			Full IAEA – o.k.	hearings will be set as follows:
Со	nt. from		Will dated: 09/08/2015	• Thursday, 01/05/2017 at 9:00a.m.
	Aff.Sub.Wit.	s/p	***** daled: 07/00/2010	in Dept. 303 for the filing of the
1	Verified	•	Residence: Fresno	Inventory and Appraisal <u>and</u>
			Publication: The Business Journal	<ul> <li>Thursday, 10/05/2017 at 9:00a.m.</li> <li>in Dept. 303 for the filing of the first</li> </ul>
	Inventory			account and final distribution.
	PTC		Estimated value of the Estate:	Pursuant to Local Rule 7.5 if the required
	Not.Cred.		Personal property - \$80,075.20 <u>Real property - \$200,000.00</u>	documents are filed 10 days prior to the
✓	Notice of		Total - \$280,075.20	hearings on the matter the status hearing
	Hrg	,	<b>4</b>	will come off calendar and no appearance
✓	Aff.Mail	w/o	Probate Referee: Rick Smith	will be required.
1	Aff.Pub.			
	Sp.Ntc.		Objection to Admission of Will to Probate	
	Pers.Serv.		and to Appointment of Personal  Representative filed 08/04/2016 states	
	Conf.		Objector is informed and believes and	
	Screen		thereon alleges the purported Will of the	
1	Letters		Decedent, that is the subject of the June	
			27, 2016 Petition for Probate of Will and for	
✓	Duties/Supp		Letters Testamentary and Authorization to	
1	Objections		Administrator Under the Independent Administration of Estates Act filed by	
Ė	Video		Petitioner Diane Cercado (hereinafter	
	Receipt		"Petitioner"), was the product of undue	
	Cl Report		influence by the Petitioner, who was the	
	9202		Decedent's caregiver prior to and	
	Order		subsequent to the execution of the	
_			purported Will.	
	Aff. Posting			Reviewed by: LV
	Status Rpt		Please see additional page	Reviewed on: 08/02/2016
	UCCJEA			Updates: 08/03/2016
	Citation ETP Notice			Recommendation:
	FTB Notice			File 21- Templer
				21

#### 21(additional page) Donald I. Templer (Estate)

Case No. 16CEPR00669

The purported Last Will and Testament of Donald Templer dated 09/08/2015 names the Petitioner – non-family member and paid caregiver- as the Proposed Executor and sole beneficiary of Decedent's estate. Objector is Decedent's cousin, and as such Objector is an "interested person" entitled to contest the admission of the purported will to probate as that term is defined in Probate Code Section 48(a)(1).

Objector intends, within 30 days, to file a Contest and Grounds of Opposition to Admission of Will to Probate and Opposition to Appointment of Personal Representative under Probate Code Sections 8004 and 8250, but due to the recent retention of legal counsel is unable to file such Contest in advance of the August 4, 2016 hearing.

Wherefore, Objector prays for an Order of the Court as follows:

- The Court deny the admission of the purported Will to probate and continue hearing on the Petition of Diane Cercado for Letters of Testamentary to allow Objector insufficient time to file his intended Contest of Will; and
- 2) For such other and further Order or Orders as the Court may deem appropriate.

Attorney

Willoughby, Hugh W. (for Petitioners Stanley Emerzian and Nancy Suglian)

#### Petition to Determine Succession to Real Property

DOD: 3/15/13	STANLEY EMERZIAN and NANCY SUGLIAN,	NEEDS/PROBLEMS/COMMENTS:
	Son and Daughter, are Petitioners.	
	40 days signa DOD	
	40 days since DOD	
	No other proceedings	
Aff.Sub.Wit.		
✓ Verified	1&A: \$80,000.00 (a 2/3 interest in real	
✓ Inventory	property located at 2927 E. Harvard in	
PTC	Fresno)	
Not.Cred.	Will dated 6/11/59 devises the entire	
N/A <b>Notice of</b>	estate to Petitioners in the event that the	
Hrg	decedent's wife, Dorothy Emerzian, is not	
Aff.Mail	living. (Dorothy predeceased the	
Aff.Pub.	decedent on 11/29/05.)	
Sp.Ntc.	Petitioners request Court determination	
Pers.Serv.	that the decedent's 2/3 interest in the real	
Conf.	property passes to them in 1/2 undivided	
Screen	interests each as tenants in common.	
Letters	=	
Duties/Supp	=	
Objections		
Video Receipt		
CI Report	=	
9202	=	
✓ Order	=	
Aff. Posting	1	Reviewed by: skc
Status Rpt	1	Reviewed on: 8/2/16
UCCJEA	1	Updates:
Citation	]	Recommendation: SUBMITTED
FTB Notice		File 22- Emerzian

Attorney: Julie C. Jones (for Petitioner Taisha Paggett)

#### Petition for Appointment of Temporary Guardian of the Person

	GENERAL HEARING 9/22/16	NEEDS/PROBLEMS/COMMENTS:
	SERVERAL HEARING 7/22/10	NEEDS/TROBLEMS/COMMENTS.
Cont. from Aff.Sub.Wit.	TAISHA PAGGETT, sister, is petitioner.  Please see petition for details.	<ol> <li>Need Notice of Hearing.</li> <li>Need proof of personal service of the Notice of Hearing along with</li> </ol>
✓ Verified  Inventory		a copy of the temporary petition on: a. Kapria Armstrong (mother)
Not.Cred.  Notice of X		
Hrg Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv. X		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
<b>√</b> Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 8/2/16
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 23- Paggett

## Nijah Montgomery, Sylvester Taylor, V, Kai King (GUARD/P) Case No. 16CEPR00772

Petitioner Day, Shameka Shanae (Pro Per – Maternal Aunt – Petitioner)

Petitioner Taylor-Anderson, JoAnn (Pro Per – Paternal Grandmother of Sylvester – Petitioner)

Petitioner Taylor, Josephine Shanae (Pro Per – Paternal Aunt of Sylvester – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
\rightarrow \right	Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt	See petition for details.	1. If diligence is not found, need personal service of Notice of Hearing with a copy of this temp petition at least five court days prior to the hearing per Probate Code §2250(e) on: - Nijah's father - Christopher King (Kai's father)
	CI Report	=	
	9202		
~	Order	]	
	Aff. Posting		Reviewed by: skc
	Status Rpt	]	Reviewed on: 8/2/16
~	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 24- Montgomery/ Taylor/ King

# 25 Elizabella Lynne Godina, Micheal Godina, Emily Williams (GUARD/P) Case No. 15CEPR00615

Petitioner: Melissa Katherine Meno (pro per) Petitioner: Jackalyn Nicole Meno (pro per)

#### Petition for Appointment of Temporary Guardian of the Person

	Petition for Appointment of Temporary Guardian of the Person				
			TEMPORARY EXPIRES 8/4/16	NEEDS/PROBLEMS/COMMENTS:	
			GENERAL HEARING 9/26/16	This petition is as to EMILY	
			AAFUGGA AAFNO	WILLIAMS only.	
Cont. from			MELISSA MENO and JACKALYN NICOLE MENO, maternal cousins, are	ŕ	
	Aff.Sub.Wit.		petitioners.		
	Verified		permeners.		
✓					
	Inventory				
	PTC				
	Not.Cred.				
1	Notice of				
	Hrg				
✓	Aff.Mail	W/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
1	Conf.				
	Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Reviewed by: KT	
	Status Rpt			Reviewed on: 8/2/16	
1	UCCJEA			Updates:	
	Citation			Recommendation:	
_	FTB Notice			File 25- Godina/ Williams	

## 26 Bibiana Salazar (GUARD/P)

Petitioner: Carla Alaniz (Pro per – Sister)

#### Case No. 16CEPR00780

### Petition for Appointment of Temporary Guardian

			GENERAL HEARING 9/26/2016	NEEDS/PROBLEMS/COMMENTS:
			CARLA ALANIZ, sister, is petitioner	Need Notice of Hearing.
C c c	nt. from  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf.	X	See petition for details.	<ol> <li>Need proof of personal service at least five court days before the hearing of Notice of Hearing with copy of temporary petition or consents and waivers of notice or declarations of due diligence for:         <ol> <li>Jesse Andrews Salazar (father)</li> <li>Bibiana Castro (mother)</li> <li>Bibiana Salazar (ward)</li> </ol> </li> </ol>
<b>/</b>	Screen Letters			
<b>√</b>	Duties/Supp			
	Objections Video Receipt CI Report 9202 Order			
	Aff. Posting Status Rpt			Reviewed by: SEF Reviewed on: 8/2/2016
<b>✓</b>	UCCJEA Citation			Updates:  Recommendation:
	FTB Notice			File 26- Salazar

## 27 In the Matter of Brian Jacob Lande and Melissa Annette Carleton Case No. 16CEPR00720

Attorney John Hastrup (for Brian Jacob Lande, Conservator of the Person and Estate)

Petition for Approval of Transaction Involving Community Property Where One Spouse Lacks Capacity

-	One spouse tacks capacity	
	BRIAN JACOB LANDE, spouse and	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person and Estate of	
	MELISSA ANNETTE CARLETON appointed on	Continued from 7/28/2016.
	8/25/2016 in Case 16CEPR00606, is Petitioner.	
Cont. from 072816		Note Re Related Case: Minute
Aff.Sub.Wit.	~Please see Petition for details~	Order dated 10/21/2015 from
1.7 200 1	Trease see remion for details	the status hearing for the filing of the first and/or final
√ Verified		account of the
Inventory	Declaration of Brain Jacob Lande Re	Conservatorship of Melissa
PTC	Characterization of Property to be Acquired	Annette Carleton, Case
Not.Cred.	in Transaction Where One Spouse Lacks	16CEPR00606, states the Court
	Capacity filed 7/28/2016.	agrees that no formal
		accounting needs to be filed,
A SE A A cuit		and grants the request that a
✓ Aff.Mail W/	Declaration of John W. Hastrup Re	separate inventory and
Aff.Pub.	Characterization of Property to be Acquired	appraisal not be filed.
Sp.Ntc.	in Transaction Where One Spouse Lacks Capacity filed 7/28/2016.	
Pers.Serv.	Cupachy med 7/28/2018.	
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
√ Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 8/1/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 27- Lande/ Carlton